

The Small Business Owner's
**COMPLETE
MARKETING
CHECKLIST**

*92 Simple Steps to Building Your
Profit-Generating Marketing Plan*

PostcardMania

Postcard Marketing Experts



Whether you are a venerable marketing deity or you can't find an effective campaign with two hands and a flashlight, there is always room for improvement. And what better way to improve than to have an objective standard against which to measure yourself? I can't think of one.

I created this 92-point checklist to be that objective standard. No matter what marketing level you're on, this checklist will give you the direction you need to take a step forward, improve your results, and make more money. For now, do this:

1. Print out this checklist. Digitally checking things off is just not as satisfying as slapping that checkmark on with your very own pen. Trust me.
2. Go through the checklist, proudly checking off your current marketing accomplishments. (I like to use an extra fat Sharpie!)
3. Get to work implementing the remaining points, so you can get back to checking things off.

Throughout the checklist, you will see links that take you to articles, blog posts, and downloads that explain more about the topic of that point. Use them. (And not judiciously, either. Use them quickly and often.) If you don't understand what a checkpoint is talking about, use the resource. If the resource doesn't clear it up for you, call us at 800-628-1804! We'll break it down for you.

Last point: Don't freak out! Yes, 92 points seem like a lot, but you'll realize that you actually do many of these things already. And if you don't, many are simple to implement – and pay for themselves in no time! Let's do this!

Market Research

If you want to market effectively, you need to know what is going on in your industry. You need to have a working knowledge of what's going on in the marketing industry. And you definitely need to have a crystal clear vision of who you are marketing to. Let's see how you stack up.

Beginner

- I know EXACTLY who my target market¹ is.
- I can name my main competitors.
- I have compared my pricing to my competitors'.
- I'm on my competitors' mailing lists and email lists².
- I know the number of potential customers for my service in my target area.
- I know the exact dollar value of the maximum product I can deliver.
- I have subscribed to marketing and industry information³ like newsletters, print publications or Google alerts⁴ to stay informed in my industry and marketing in general.

Intermediate

- I'm on my competitors' mailing lists and keeping track of how often they promote to me.
- I can spout the demographics of my ideal customer⁵ in my sleep.
- I have a mind-bendingly awesome Unique Selling Proposition⁶ that differentiates me from my competitors.

Advanced

- I've run an exact count of how many people or businesses fit my targeted demographics⁷.
- I've had my database of past customers fully analyzed by professionals⁸ to identify targeting opportunities I may have missed.

1 <http://goo.gl/9E2Ezd>

2 <http://goo.gl/ovOgXc>

3 <http://www.postcardmania.com/blog/>

4 [www.google.com.alerts](http://www.google.com/alerts)

5 <http://goo.gl/XIK9ve>

6 <http://goo.gl/yPgB9L>

7 <http://www.postcardmania.com/listcount>

8 <http://goo.gl/JYVtxR>

Targets/Budgeting

You know what they say, “Without a dedicated budget and specific target goals, your marketing is doomed.” Ok, fine, maaaaybe it’s just me who says that. But it’s still true! Without a budget and clear targets, your marketing will flounder and you will eventually give up on it. And that is all sorts of bad news for your bottom line. So, mind the points...

Beginning

- I have set weekly, monthly and annual lead generation targets.
- I actually check in on these targets regularly and take action to ensure I meet them (getting into a habit of graphing them weekly in excel and printing them and hanging on your wall can be very helpful!).
- I know how much it costs me to generate one new lead or customer based on past marketing actions.
- I set aside a portion of the money that I make each week for marketing actions⁹.
- I know what the lifetime value of my average customer¹⁰ is so I know how much I want to spend to acquire a new one.

Intermediate

- I have determined the percentage¹¹ of my gross income I need to set aside for marketing to ensure continued growth.

Advanced

- I have started building up a reserve to make sure I can continue my marketing, regardless of what the economy does.

9 <http://goo.gl/5Q93ik>

10 <http://goo.gl/s3DJRu>

11 <http://goo.gl/iQqkf5>

Tracking

If you don't know where your leads are coming from, you have no hope of optimizing your marketing to make the most out of your budget. It is not an "everybody gets a trophy" world when it comes to your marketing budget. Only the winners get continued funding. And I want YOU to be a winner.

Beginner

- I have a New Caller Sheet¹² that everyone who answers our phones here uses to track leads and how they heard about us.
- My sales people/receptionists are trained to ask ALL prospects how they heard about us EVERY time without fail. (And if the response is "your website," to ask what marketing action brought them to your site)
- I track the total number of leads I get from each separate marketing avenue.
- I track the total revenue I get from each separate marketing avenue.
- I calculate my ROI¹³ for each marketing avenue every month.

Intermediate

- I have a CRM (Customer Relationship Management) system¹⁴ where I keep track of how contacts heard about me.
- I know how to pull reports from my CRM system and analyze them.
- I track the number of leads from each distinct marketing campaign (postcard design, commercial, phone blitz, etc.).

Advanced

- I actually pull reports from my CRM on a set schedule and make decisions based on what I find.
- I use unique tracking phone numbers¹⁵ on my promotion so I can accurately track the number of calls generated by each.
- I track the channels through which leads contact me and calculate which are the most profitable. (Are phone leads better than email leads? Are direct mail leads warmer than website leads? Etc.)

12 <http://goo.gl/kXXdtm>

13 <http://goo.gl/qeRSUJ>

14 <http://goo.gl/mzIEVt>

15 <http://goo.gl/5Q3K1m>

Direct Mail

Direct mail is sort of like the tortoise that beats the hare. It's not flashy, but it plugs along, getting you results month after month. Before you know it, your business is booming and you are increasing your mailings. That's just life. So if you have any boxes unchecked in this section, give us a call at 1-800-628-1804 and we'll get you taken care of.

Beginner

- I understand the importance of repetition¹⁶ in direct mail marketing.
- I understand what a postcard campaign is and how it works¹⁷.
- I have read completed an Estimation of Effort worksheet¹⁸, so I know how many postcards I need to send to get the response I desire.
- I have run a mailing list count¹⁹ of my target market.
- My direct mail piece has all necessary design points²⁰.
 - A clear, bold headline.
 - A graphic that supports the message.
 - Color that pops.
 - Subheads that lead into text.
 - Benefits, benefits, benefits*
 - A compelling offer.
 - Your company name and logo.
 - Call to action.
 - Contact information.
 - Return address.
- I have scheduled my direct mail campaign.
- I have prepared my receptionists and sales people to receive calls.
- I make sure to remove the returned mail pieces I get from my lists so not to waste postage.

** One of the biggest errors people make in advertising is stating features, rather than benefits. For example, never assume recipients know what benefit can be derived from a lower interest rate on their mortgage. Let them know that their monthly payments will go down.*

16 <http://goo.gl/XpyLXa>

17 <http://www.postcardmania.com/postcardmarketingmanual>

18 <http://goo.gl/oYDsLv>

19 <http://goo.gl/Q2ooTG>

20 <http://goo.gl/684FTj>

Intermediate

- I have setup a campaign to continually send direct mail pieces to prospects and customers.
- I have run test mailings, and made decisions about future campaigns based on the findings.
- I know how to get the best postage rates²¹.

Advanced

- I time my direct mail campaigns to correspond with emails and other types of marketing that I am doing.

21 <http://goo.gl/4VsnQF>

Website/Landing Pages

When it comes to your website, 90% (i.e. pretty much all) of visitors are actively seeking more information about your company or product. So, guess what? Your actual front door isn't your marketing front door anymore. Your website is. If your website isn't optimized for marketing, or (GASP!) you don't have a website, you are in seven shades of trouble. Avoid them all with these points.

Beginner

- I have a website
- All of the information on my website is current and accurate
- My website has these necessary design elements:
 - A good website address – one that is easy to remember OR is the name of my company if that is available.
 - A call to action on every page
 - A home page that directs visitors exactly where to go
 - A place to collect names and contact information with a compelling offer
 - Prominent contact information
 - A professional design
 - An easy to navigate menu
 - An About Us page with Staff Pictures
 - Testimonials from happy customers
 - Photos that support the message I am trying to convey
 - An FAQ (Frequently Asked Questions) page if needed
 - A Products/Services page which delineates the benefits of each product or service I offer.
 - Details on any press or awards our company has
 - A Contact Us page
- I have gone through my website from the perspective of a potential customer and ensured it is designed to funnel me to take the action that I want visitors to take. (This can also be done by someone who has never been to your site. Just sit next to them and see where they go and what they click on).
- I have signed up for free local search listings²² (if you have a local business).

²² <http://goo.gl/LPIVgX>

Intermediate

- I have Google Analytics²³ set up on my site to track what users do.
- My website copy is optimized²⁴ so search engines will find my site and rank it highly in search results.
- I have at least one video on my site explaining my product or service.
- I know what a blog is and how to make mine amazing²⁵.

Advanced

- My website has tons of super helpful educational articles and information²⁶ on it that makes it a destination for customers and professionals in my industry.
- My blog is updated at least once a week, with search engine friendly posts²⁷ about timely topics.
- I have a Google AdWords²⁸ account and use pay per click to drive traffic²⁹ to my site.

23 <http://www.google.com/analytics/>

24 <http://goo.gl/9t9EZx>

25 <http://goo.gl/BF7XuN>

26 <http://www.postcardmania.com/marketing-education>

27 <http://goo.gl/YFo5uO>

28 <http://www.google.com/AdWords>

29 <http://goo.gl/GP9OU7>

Email Marketing

There is simply no better way to nurture leads than with email. It is cheap. It works. It is automatic (or can be). It is cheap. And it doesn't cost a lot of money. Oh and it is cheap (did I mention that?). If you only generate a few high quality leads a week, go ahead and call them. But if you are working with a bunch of prospect records, email is your friend.

Beginner

- I understand how often I should email my prospects and customers (depends on your sales cycle).
- I have setup a system to collect email addresses³⁰ over the phone.
- I have signed up with an email marketing service³¹.
- I have created a newsletter template³² which I update each time I send my newsletter.
- I track responses to my email marketing.

Intermediate

- I have tested and determined the best day of the week to send my emails on based on open and clickthrough rates.
- I know how to "split test" two different subject lines.
- I track the clickthrough rates, opt out rates, and open rates of my emails.

Advanced

- I use autoresponder campaigns³³ to automatically send emails to new prospects and prospects that move into a new section of my database (i.e. go from a "raw" lead to a "call-in" lead).

30 <http://goo.gl/UZtQgD>

31 <http://goo.gl/AizZBX>

32 <http://goo.gl/hxgpNF>

33 <http://goo.gl/QvS5FD>

Social Media

Ah, social media. The grand time-waster! And yet, it is a vital marketing avenue for growing businesses, too. What??? Quite the conundrum, I know. Use the points below to make sure you are using social media in a *useful* way, and not just posting material that will get ignored.

Beginning

- I have profiles on Facebook³⁴, LinkedIn³⁵, and Twitter³⁶.

Intermediate

- I regularly post content to my social media profiles, and I'm gaining followers.
- I keep my profiles up-to-date on all the sites I have signed up for.

Advanced

- I am aware of Google+³⁷, Instagram³⁸, Vine³⁹, Tumblr⁴⁰ and other networking sites outside the "Big 3."
- I have hired a full-time employee or outside firm to maintain my pages and profiles and turn followers into LEADS.

That's it, folks! If you can check off every point on this checklist, you are positioned well ahead of the pack, no matter what industry you're in. If you've got some work to do, don't worry! Nobody said marketing and growing a business is easy (unless they were lying). So turn that frown upside down and get to work!

Feel free to call 1-800-628-1804 at any time to speak with a professional marketing consultant. The lively conversation and proven marketing advice is always FREE.

34 <http://www.facebook.com>

35 <http://www.linkedin.com>

36 <http://www.twitter.com>

37 <http://www.google.com/+>

38 <http://www.instagram.com>

39 <http://www.vine.co>

40 <http://www.tumblr.com>